

Economic Impact of COVID-19 on the Dental Care Sector:

A First Look at “Reopening”

Wave 4 Update of HPI’s Economic Impact Poll

April Was a Tough Month



Devastating job losses: Here's who got hit the hardest



Dental practices led record health care job losses in April but are already bouncing back this month

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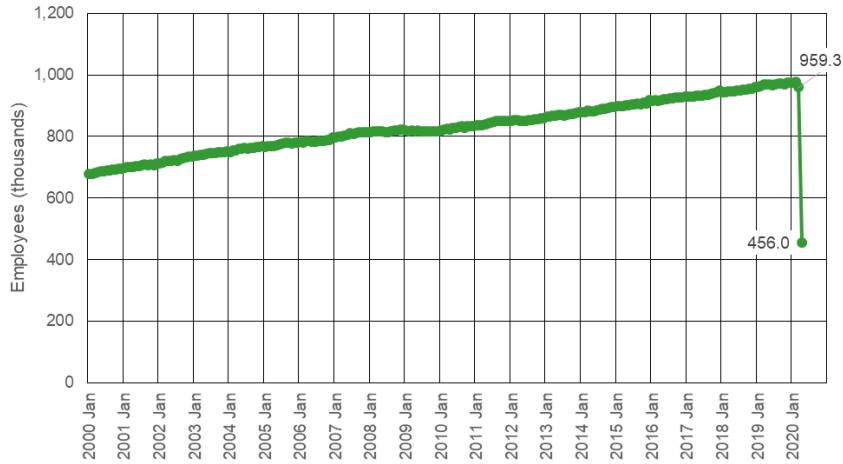
Modern Healthcare

May 08, 2020 09:10 AM

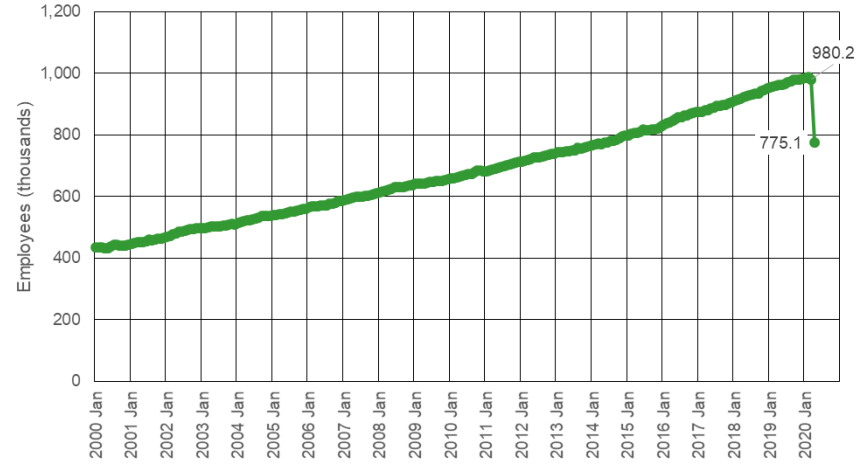
Healthcare loses 1.4 million jobs in April as unemployment rate hits 14.7%

April Was a Tough Month

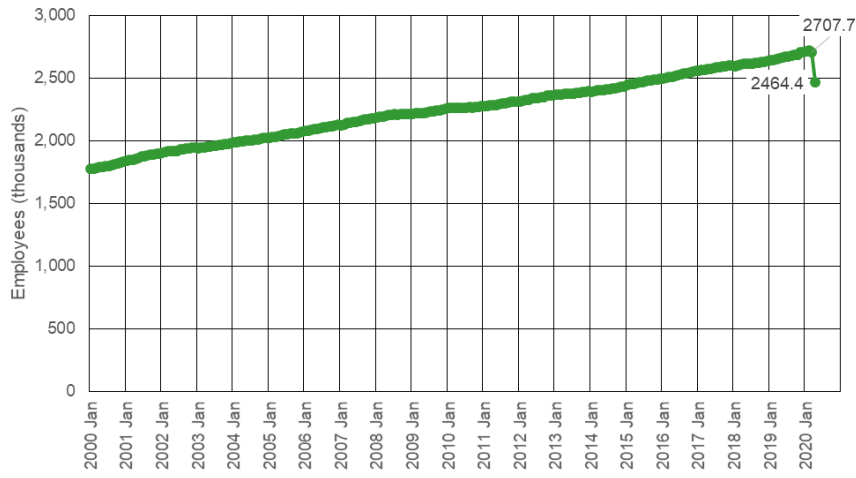
Employment in Offices of Dentists



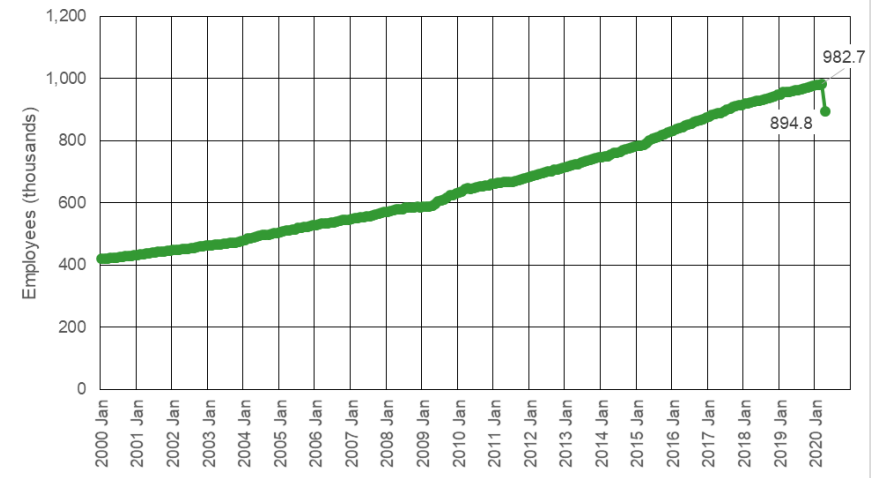
Employment in Offices of Other Health Practitioners



Employment in Offices of Physicians

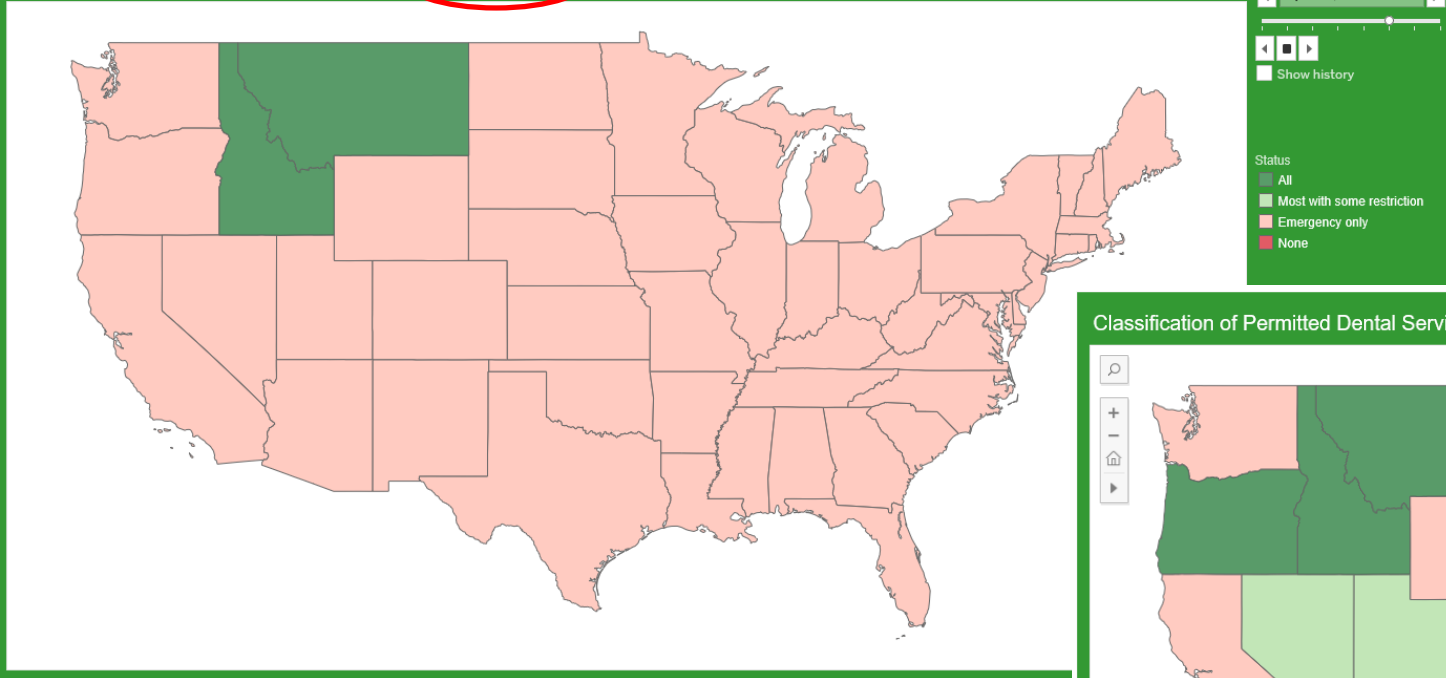


Employment in Outpatient Care Centers

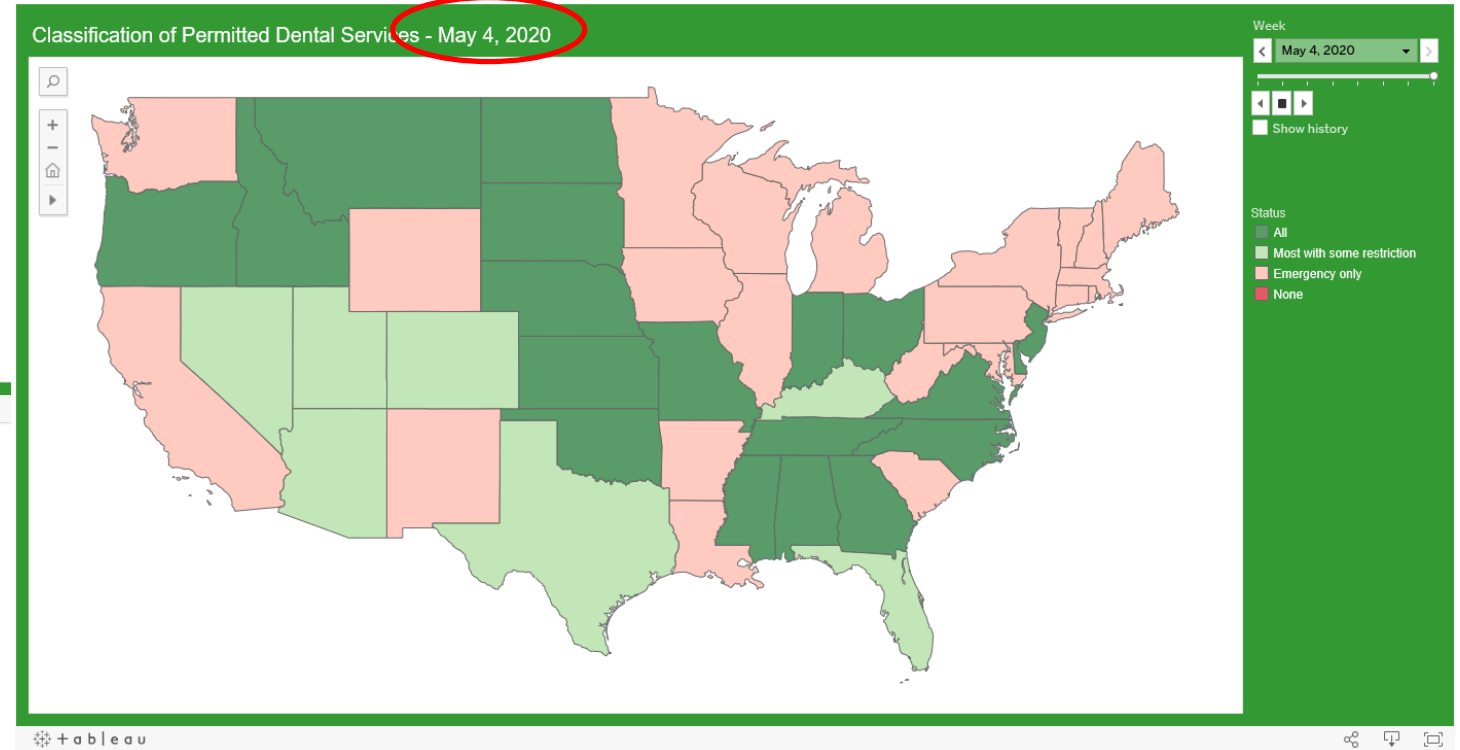


The May Reopening

Classification of Permitted Dental Services - April 20, 2020



Classification of Permitted Dental Services - May 4, 2020



HPI Economic Impact of COVID-19 Tracking Poll

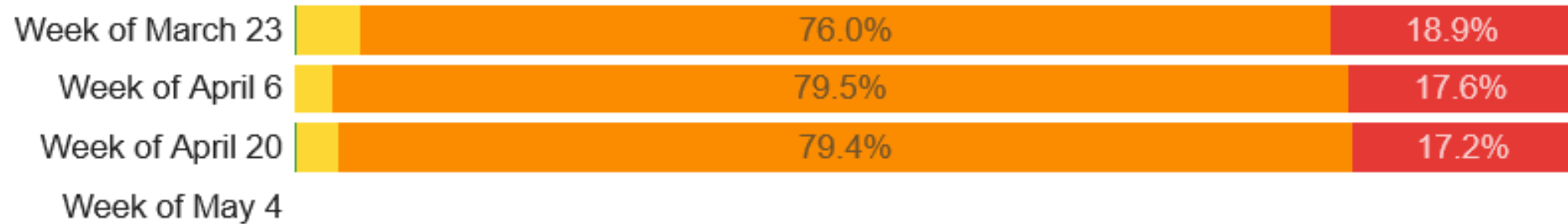
- Bi-weekly poll
- Started week of March 23rd
- Three core measures:
 - Status of your practice
 - Volume of patients and collections
 - Status of your staff
- “Question(s) of the Week”
- Response rate > 50%
- Representative sample of dentists in private practice
- Currently recruiting dentists in public health settings to be part of panel.

Number of responses

Wave	Responses
Week of March 23	19,154
Week of April 6	6,109
Week of April 20	6,614
Week of May 4	6,774

Core Questions

What is the current status of your dental practice?

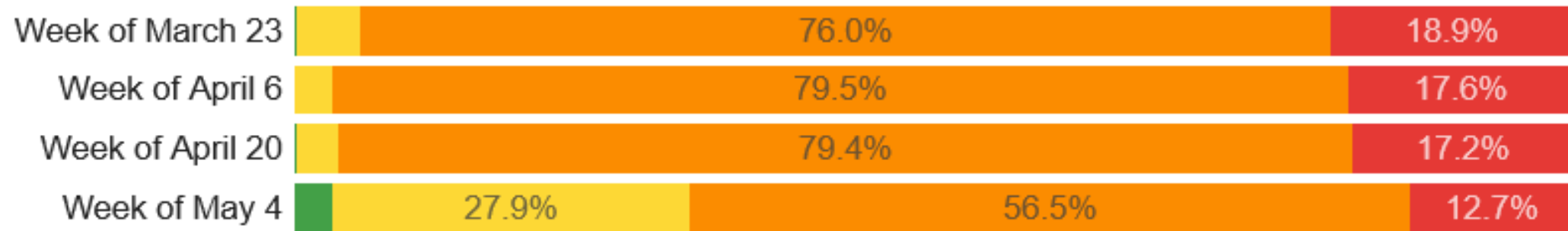


- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Core Questions

What is the current status of your dental practice?

Insight: Nationally, 30% of practices were open last week for elective dentistry compared to 3% two weeks prior.

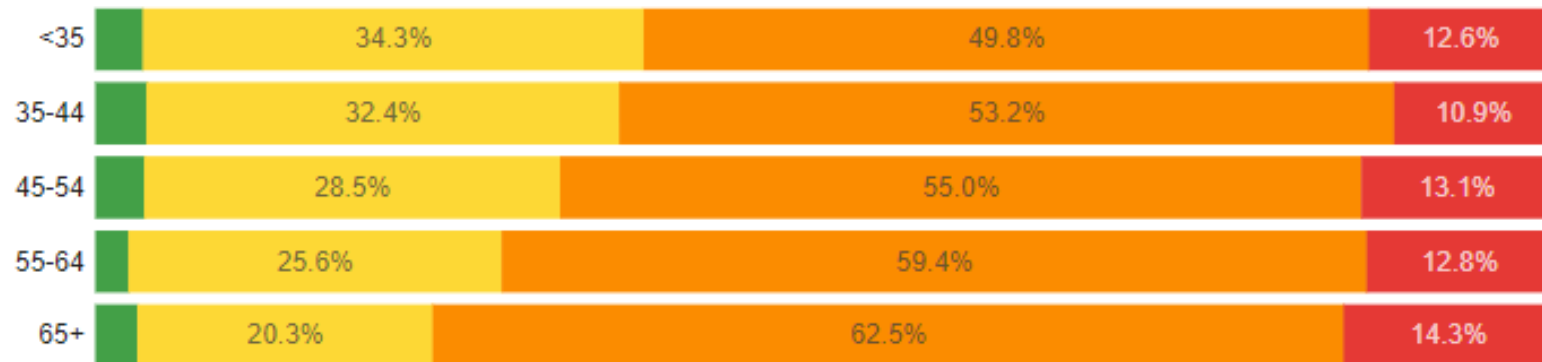


- Open and business as usual
- Open but lower patient volume than usual
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- Closed and not seeing any patients

Core Questions

Insight: Younger dentists are more likely to have opened for elective dentistry last week.

What is the current status of your dental practice?

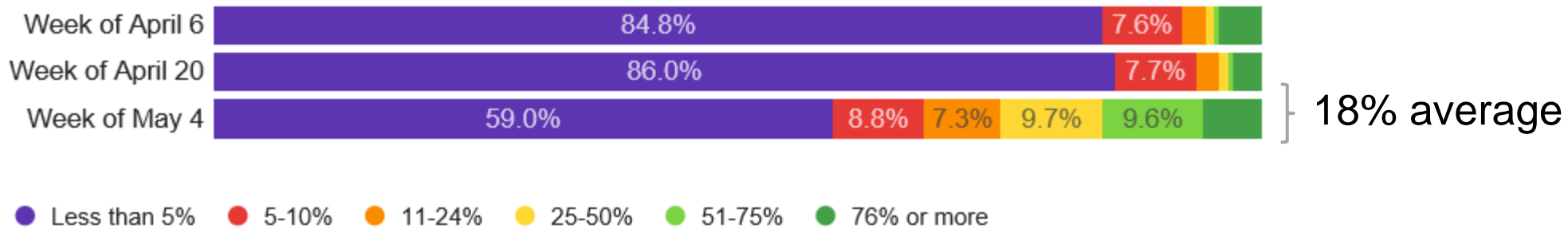


- Open and business as usual
- Open but lower patient volume than usual
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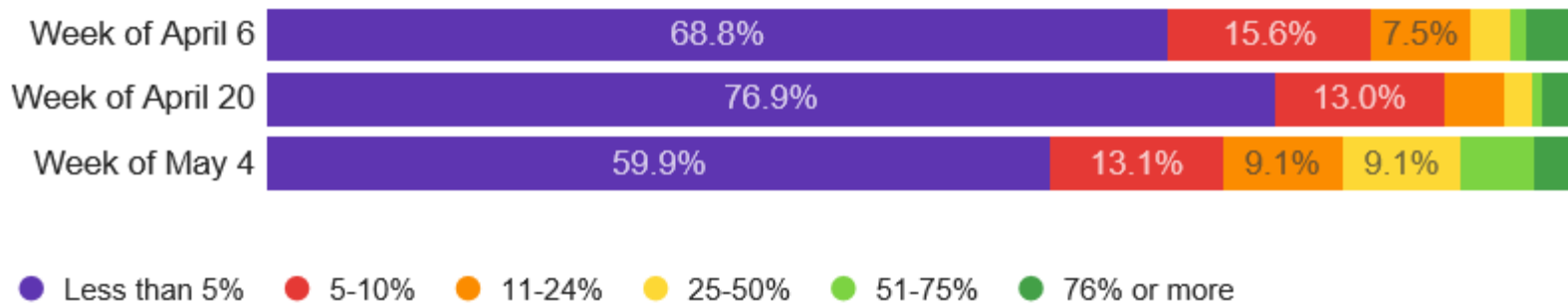
Core Questions

How does this week compare to what is typical in your practice, in terms of... *

Total Patient Volume



Volume of Total Collections



Insight: Nationally, among practices that are not fully closed, patient volume is 18% of normal, on average.

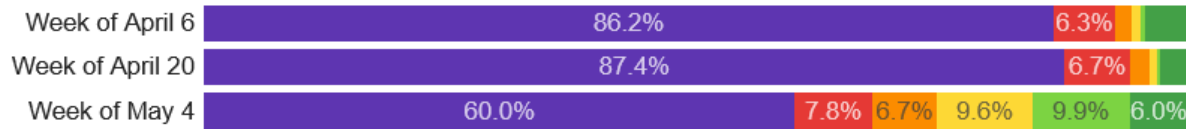
Core Questions

How does this week compare to what is typical in your practice, in terms of... *

Insight: Large groups are seeing slightly bigger bounce backs.

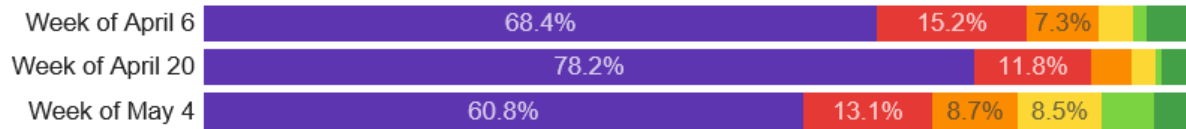
SOLO DENTISTS

Total Patient Volume



● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

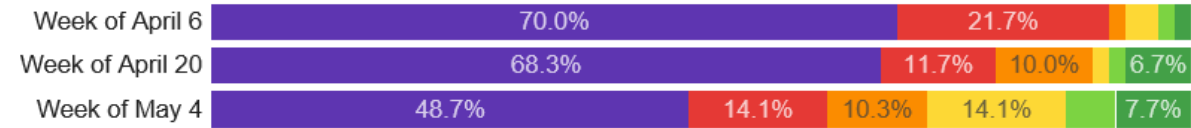
Volume of Total Collections



● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

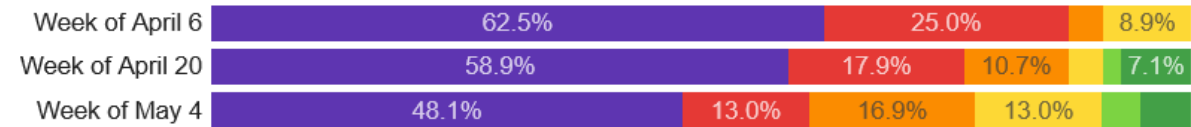
LARGE GROUP (10+ DENTISTS)

Total Patient Volume



● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

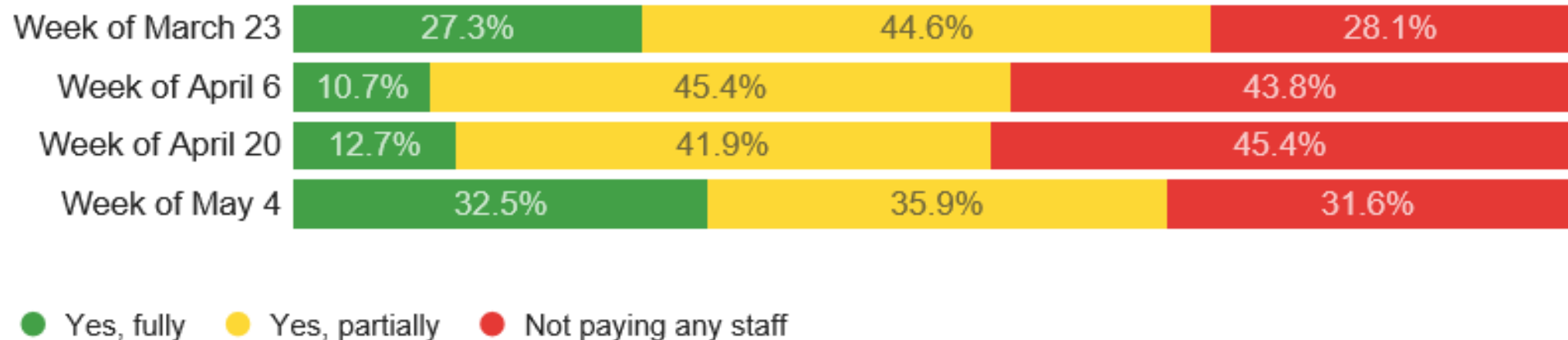
Volume of Total Collections



● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

Core Questions

Is your dental practice paying staff this week?



Question of the Week

PAY STATUS OF ASSOCIATES, EMPLOYEES, AND INDEPENDENT CONTRACTORS

[If non-owner dentist] Are YOU being paid this week?



● Yes, fully [14%] ● Yes, partially [30%] ● Not being paid at all [56%]

[If Not Being Paid at All] Are you currently receiving unemployment benefits?

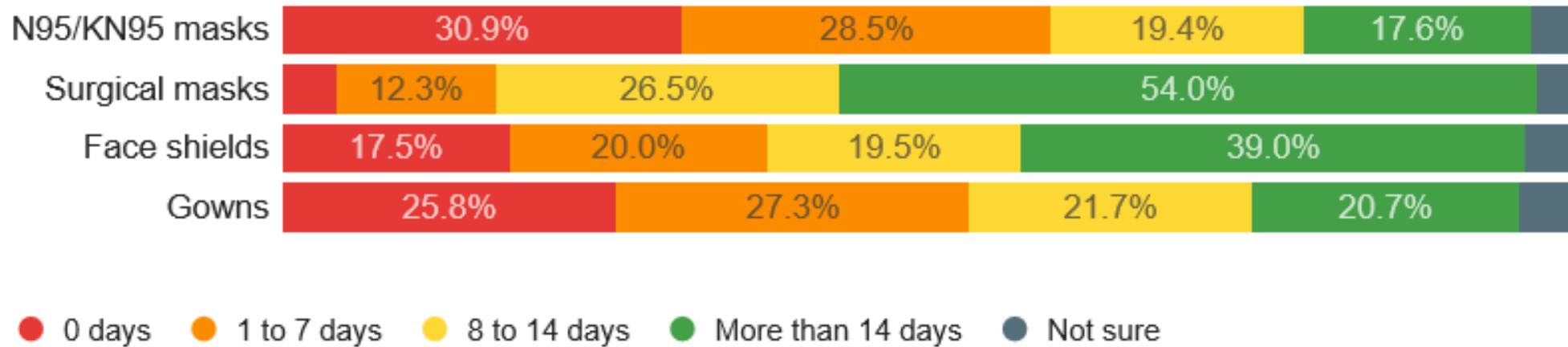


● Yes [57%] ● I've applied, but have not received any benefits yet [20%] ● No, my application was not approved [8%]
● No, I have not applied [15%]

Insight: Layoffs are hitting employee dentists very hard.

Question of the Week

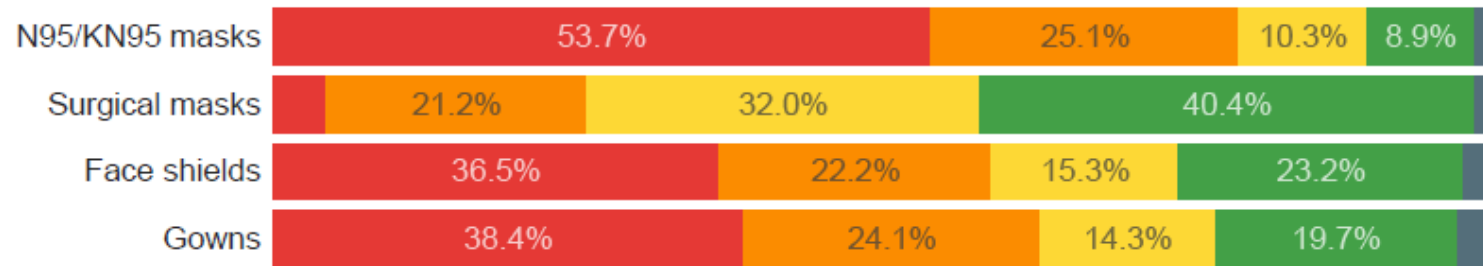
How many days' worth of the following PPE does your practice have at this time?



Insight: N95s and gowns are particularly in short supply.

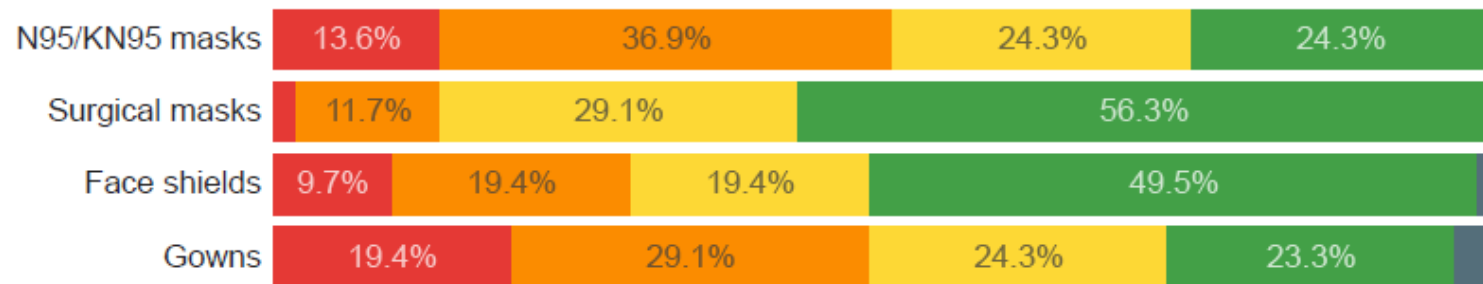
Question of the Week

How many days' worth of the following PPE does your practice have at this time?



Washington

● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure



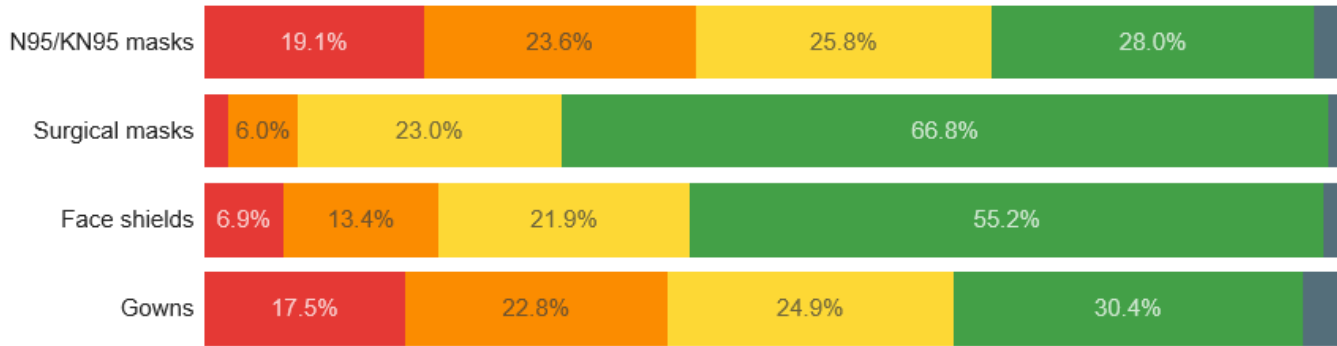
Georgia

● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure

Question of the Week

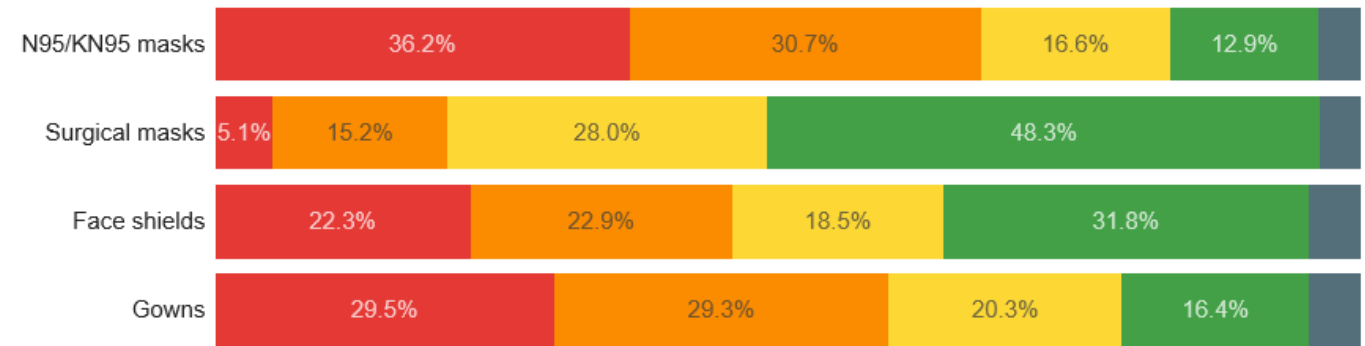
How many days' worth of the following PPE does your practice have at this time?

Practice Open



● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure

Practice Closed



● 0 days ● 1 to 7 days ● 8 to 14 days ● More than 14 days ● Not sure

Insight: Closed practices have less PPE than open practices. But lower stocks of PPE are not preventing all practices from opening.

Question of the Week

On a scale of 1 to 5, please describe your level of concern regarding the risk of transmission of COVID-19 in your practice to: _____.

1=Very concerned, 5=Not concerned at all

Insight: There is moderate concern among dentists regarding transmission of COVID-19 to themselves, their patients, and their teams.



PATIENTS



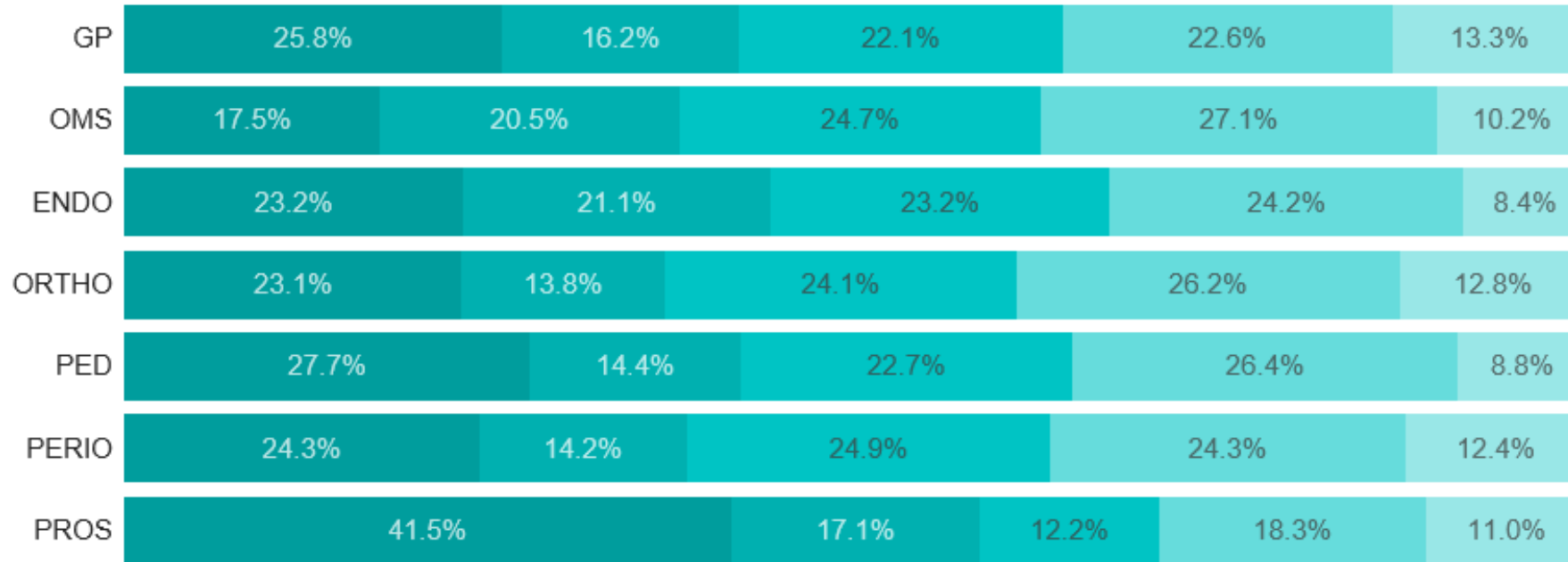
THE DENTAL TEAM



YOURSELF

Question of the Week

Concern with Risk of Transmission to Self by Specialty

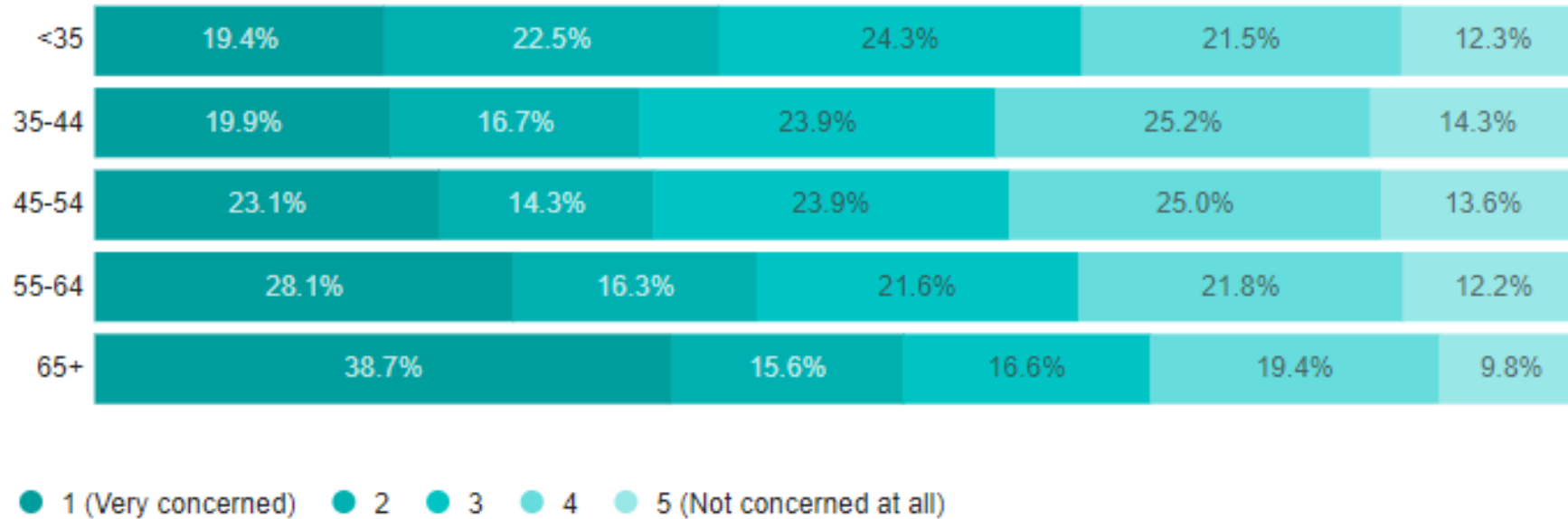


Insight: Concern with transmission risk does not vary much by specialty.

● 1 (Very concerned) ● 2 ● 3 ● 4 ● 5 (Not concerned at all)

Question of the Week

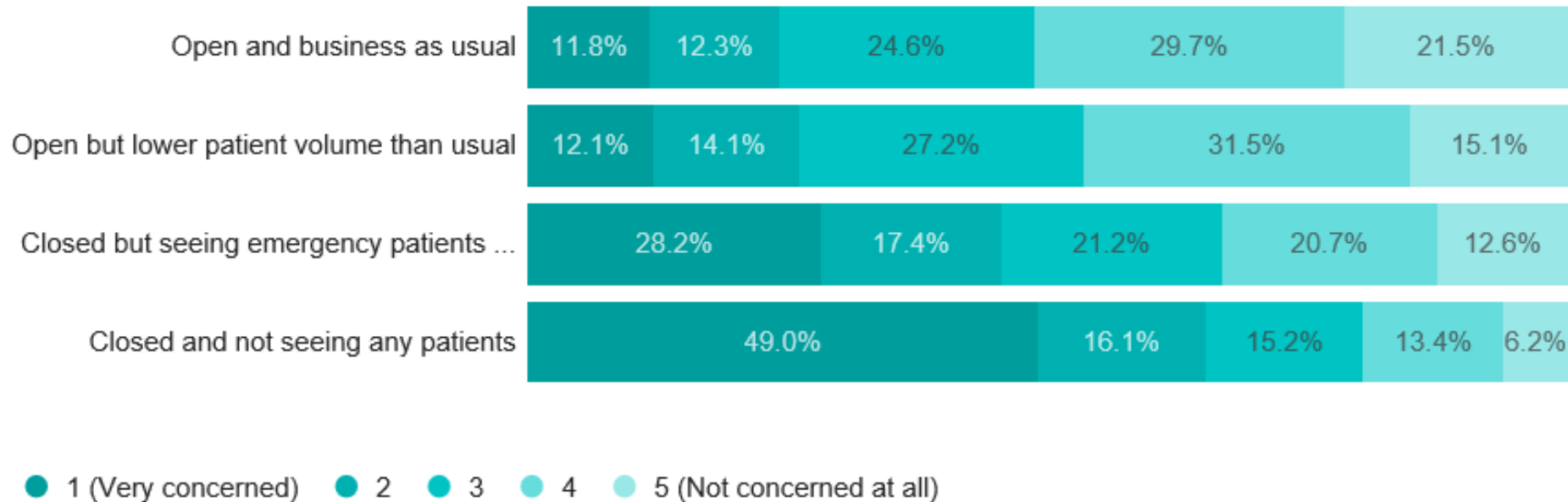
Concern with Risk of Transmission to Self by Age Group



Insight: Older dentists are most concerned with transmission risk.

Question of the Week

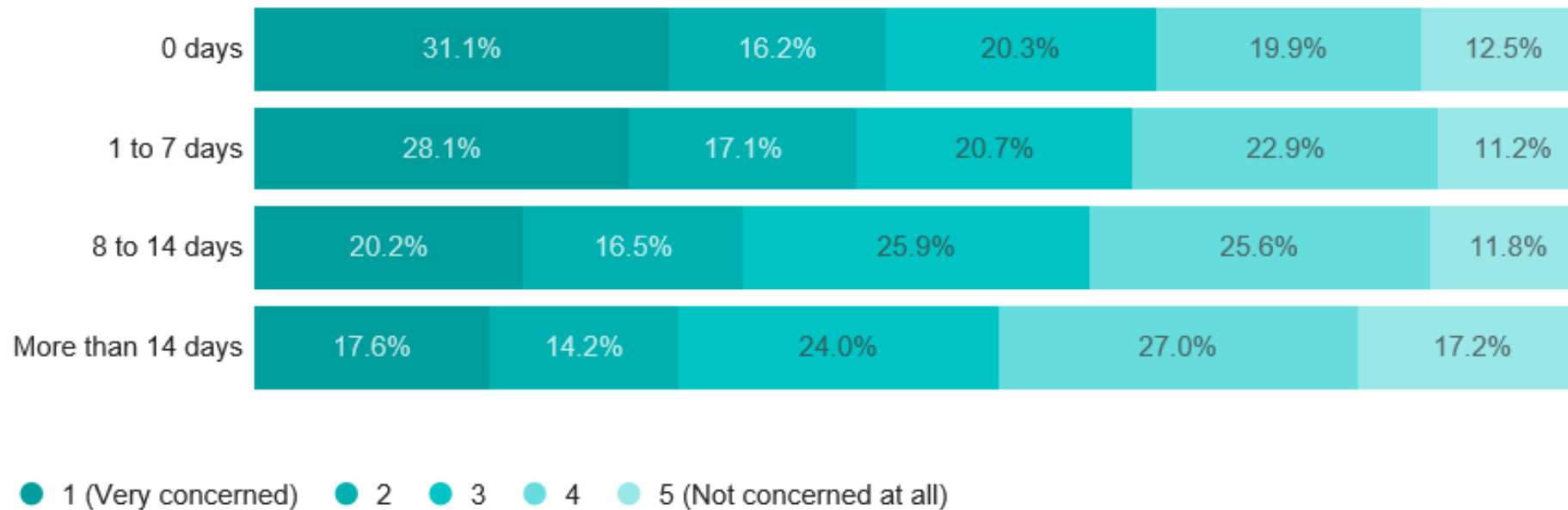
Concern with Risk of Transmission to Self by Practice Status



Insight: In practices that have opened, dentists are much less concerned with the risk of transmission of COVID-19 to themselves compared to in practices that remain closed.

Question of the Week

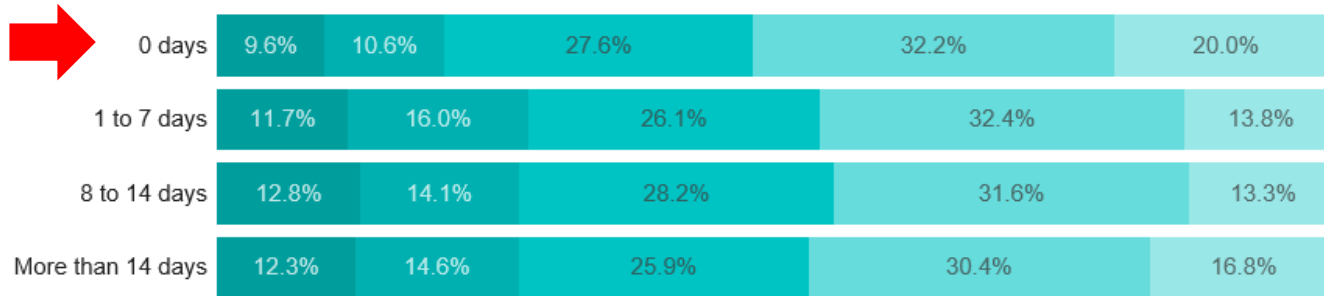
Concern with Risk of Transmission to Self by Availability of N95/KN95 masks



Insight: Dentists with bigger stockpiles of N95s express less concern when it comes to the risk of transmission of COVID-19 to themselves.

Question of the Week

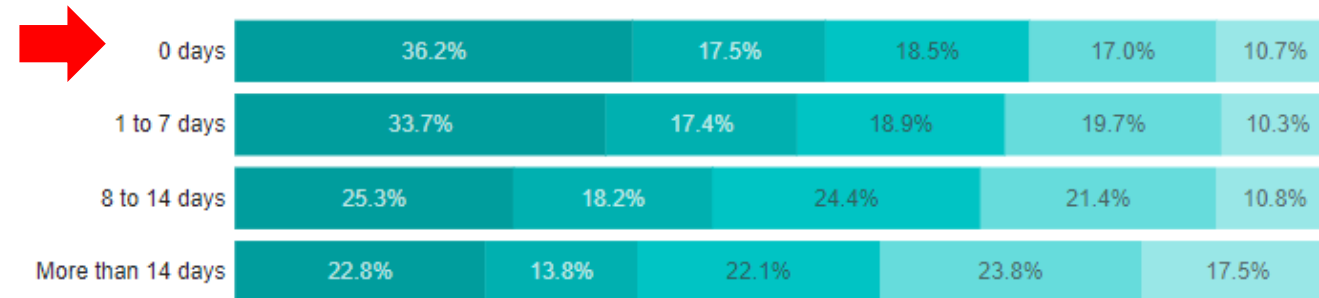
Concern with Risk of Transmission to Self by Availability of N95/KN95 Masks, Among Dentists in Open Practices



● 1 (Very concerned) ● 2 ● 3 ● 4 ● 5 (Not concerned at all)

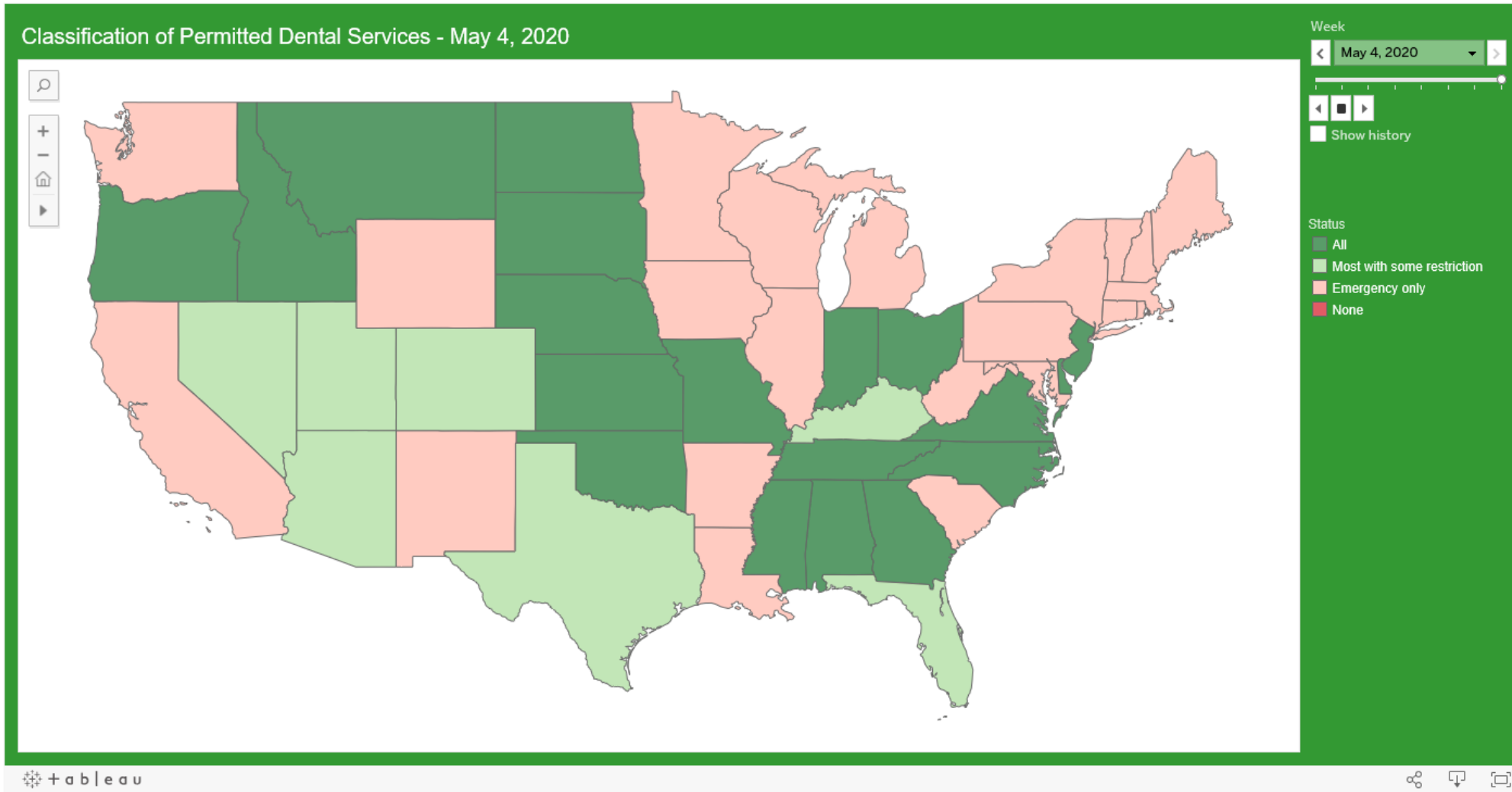
Insight: Dentists who have opened are less concerned about transmission of COVID-19 compared to dentists who remain closed, controlling for PPE stockpiles. This suggests dentist differ in attitudes and assessments of risk.

Concern with Risk of Transmission to Self by Availability of N95/KN95 Masks, Among Dentists in Closed Practices



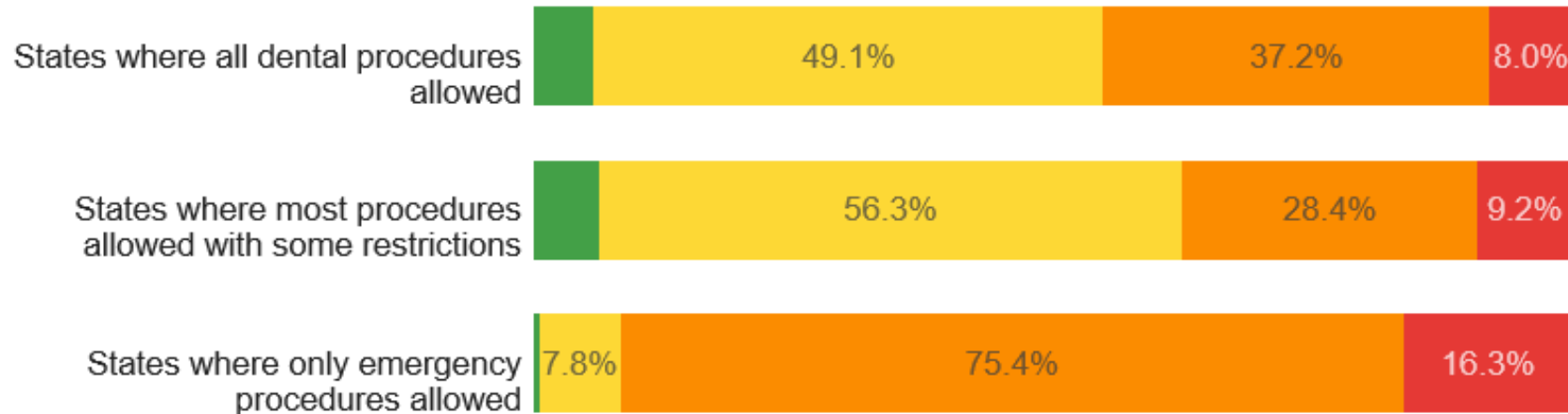
● 1 (Very concerned) ● 2 ● 3 ● 4 ● 5 (Not concerned at all)

A Closer Look at Re-opened States



Core Questions

What is the current status of your dental practice?



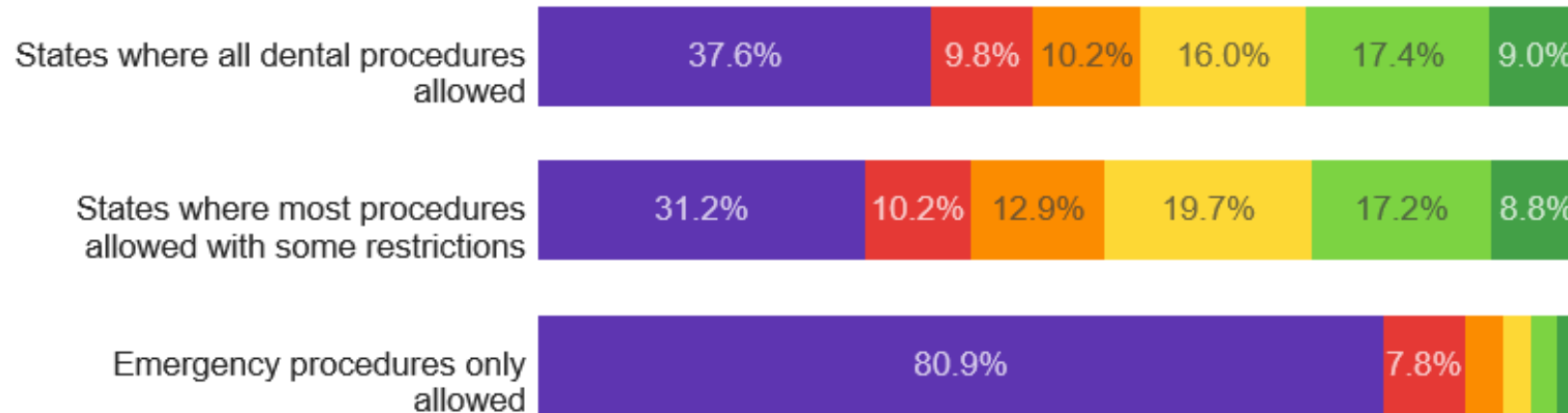
Insight: In states that have reopened, a bit more than half of practices have actually reopened.

- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Core Questions

How does this week compare to what is typical in your practice, in terms of... *

Total Patient Volume



28% average

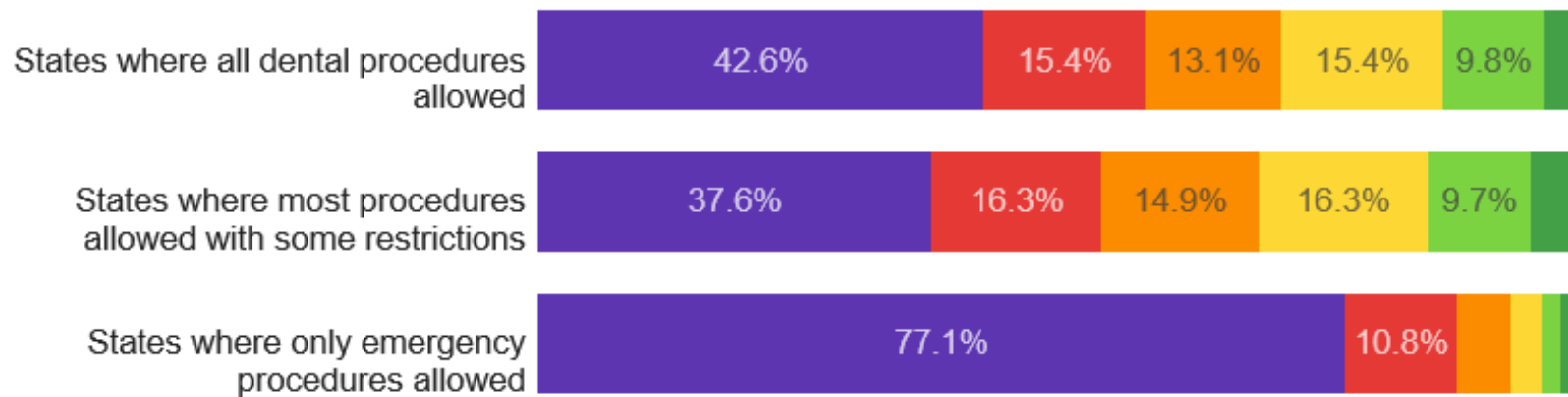
● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

Insight: In states that have reopened, patient volume was 28% of what is typical.

Core Questions

How does this week compare to what is typical in your practice, in terms of... *

Volume of Total Collections



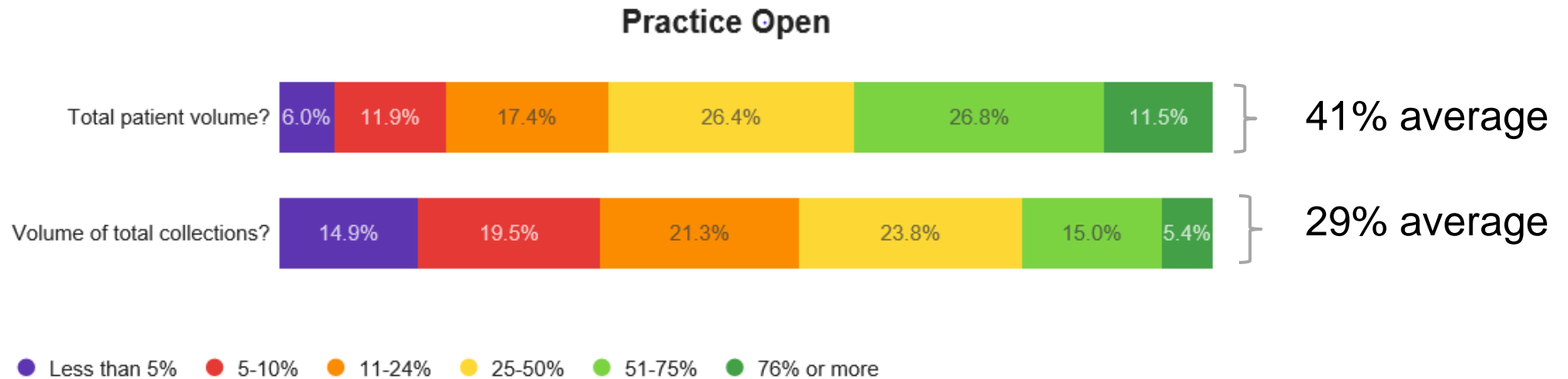
20% average

● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

Insight: In states that have reopened, volume of collections was 20% of what is typical.

Core Questions

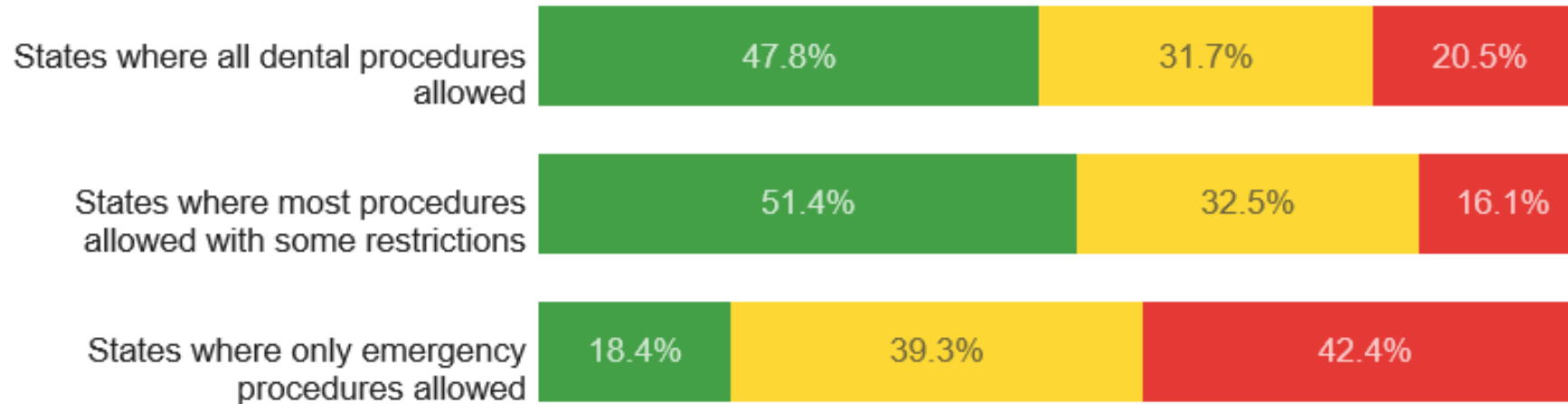
How does this week compare to what is typical in your practice, in terms of... *



Insight: In practices that are open for elective care, patient volume was 41% of what is typical and volume of collections was 29% of what is typical.

Core Questions

Is your dental practice paying staff this week?

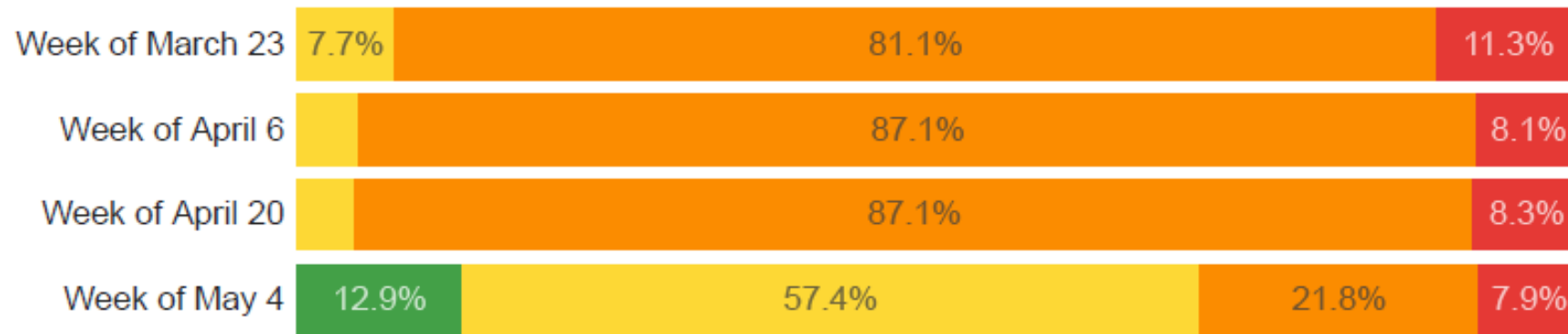


● Yes, fully ● Yes, partially ● Not paying any staff

Insight: In states that have reopened, nearly half of practices were back to fully paying all of their staff.

Arizona

What is the current status of your dental practice?

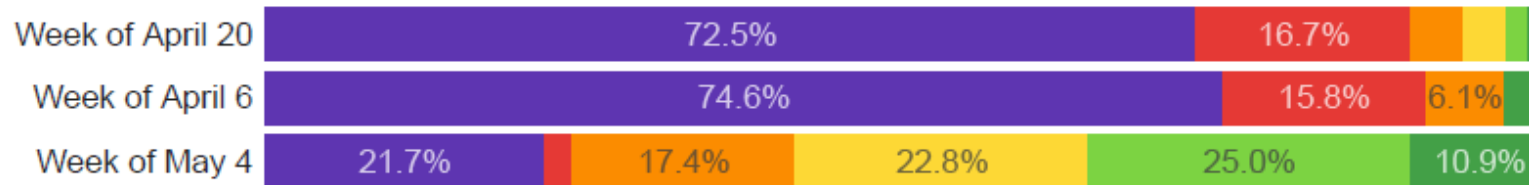


- Open and business as usual
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Arizona

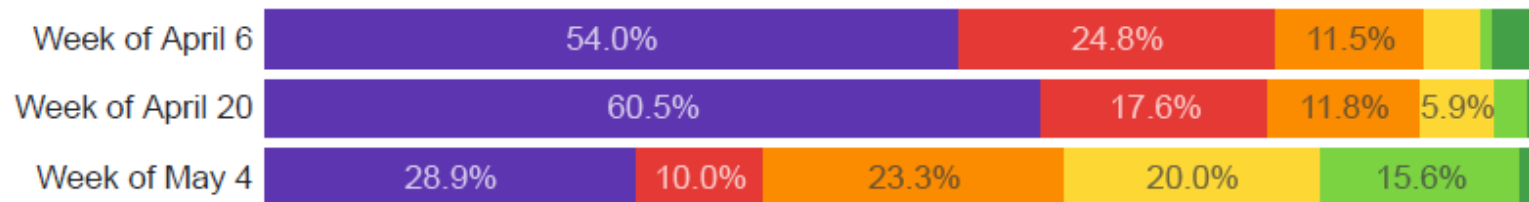
How does this week compare to what is typical in your practice, in terms of... *

Total Patient Volume



● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

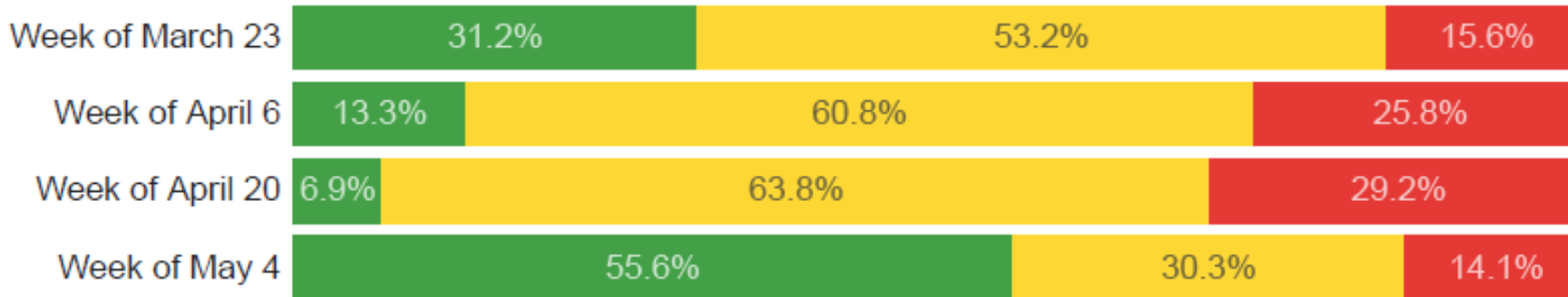
Volume of Total Collections



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Arizona

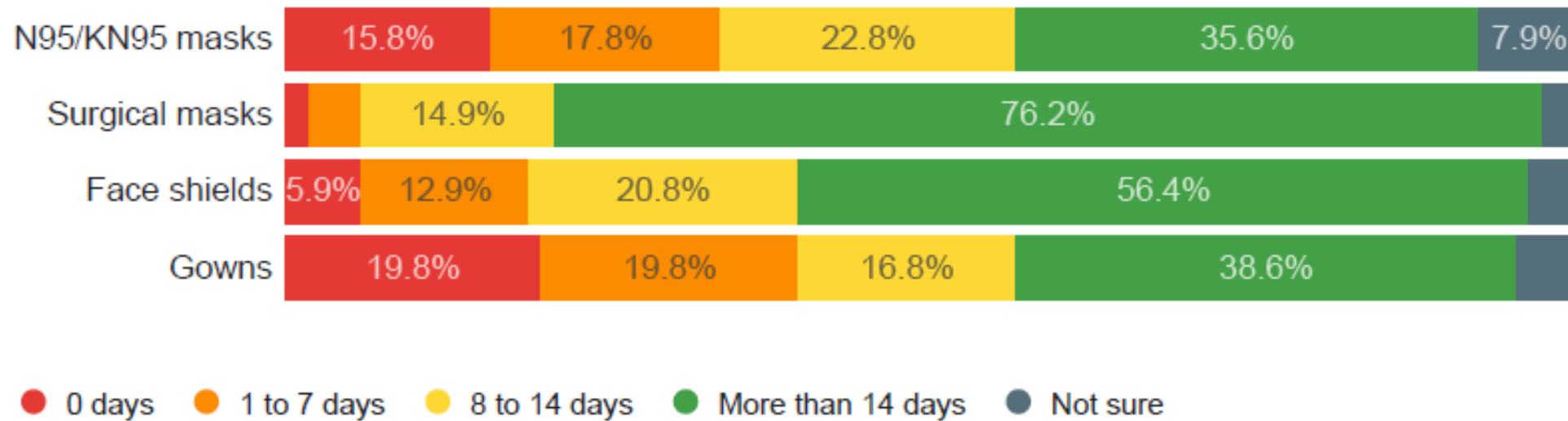
Is your dental practice paying staff this week?



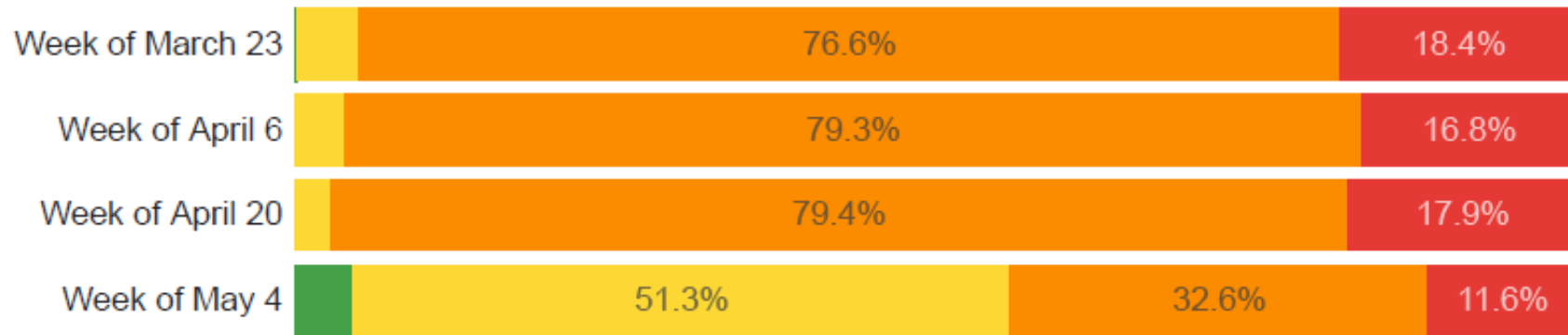
● Yes, fully ● Yes, partially ● Not paying any staff

Arizona

How many days' worth of the following PPE does your practice have at this time?

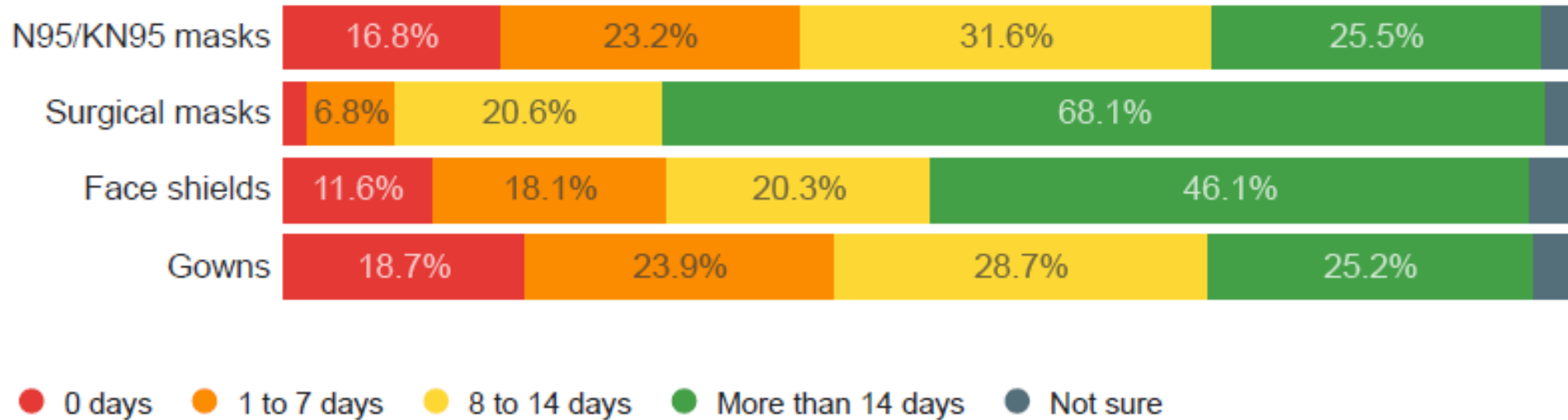


What is the current status of your dental practice?



- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

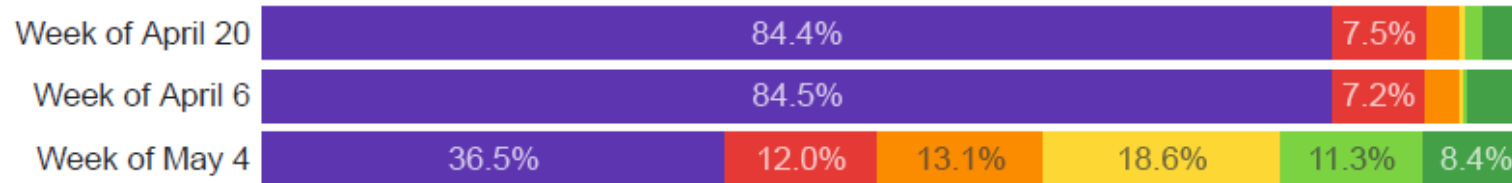
How many days' worth of the following PPE does your practice have at this time?



Texas

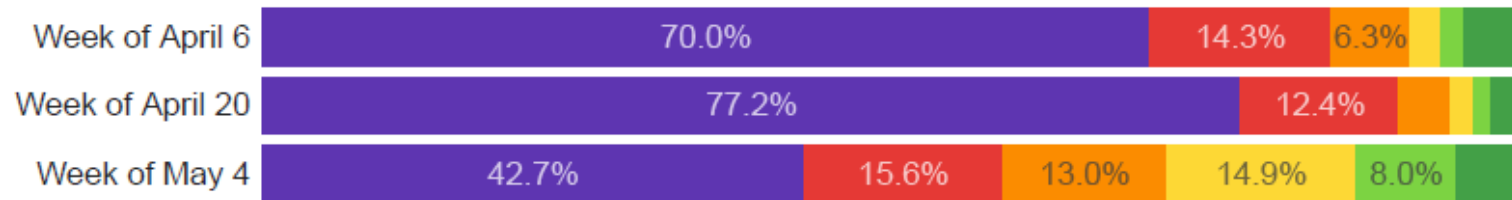
How does this week compare to what is typical in your practice, in terms of... *

Total Patient Volume



● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

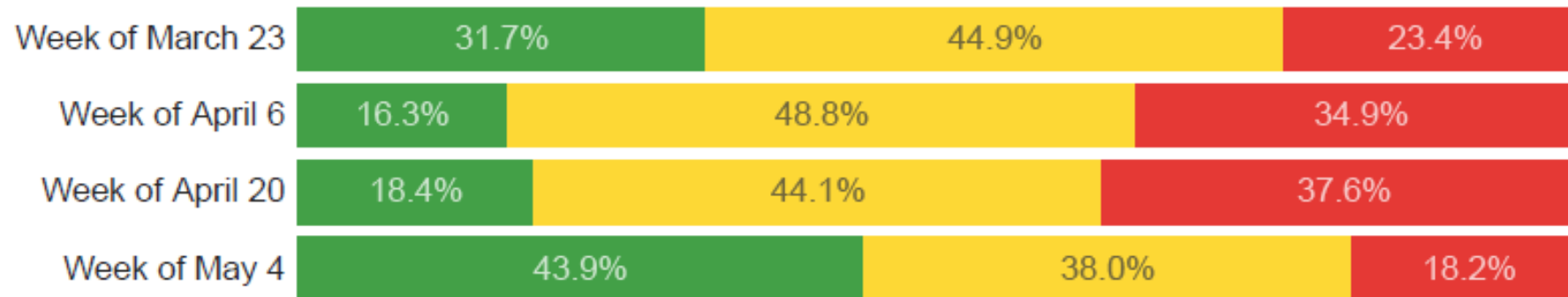
Volume of Total Collections



● Less than 5% ● 5-10% ● 11-24% ● 25-50% ● 51-75% ● 76% or more

Texas

Is your dental practice paying staff this week?



● Yes, fully ● Yes, partially ● Not paying any staff

Key Take-Aways from Week 1 of Reopening

- In states that have re-opened for elective care, more than half of dental practices were open last week. Practices were hiring back staff. Patient volume bounced back. After a tough end of March and April, the dental economy showed signs of life.
- PPE shortages are constraining re-opening. But they are not the only factor. Dentist perceptions of and attitudes toward COVID-19 transmission risk – independent of PPE availability – are partly driving re-opening decisions.
- The coming weeks will provide much more robust data as more states re-open. In particular, patient volume trends will shed light on the degree of recovery. In the meantime, week 1 re-opening data support cautious optimism.
- Join us again in two weeks!

Thank You!



[ADA.org/HPI](https://ada.org/HPI)

hpi@ada.org



ADA American Dental Association®

April Data

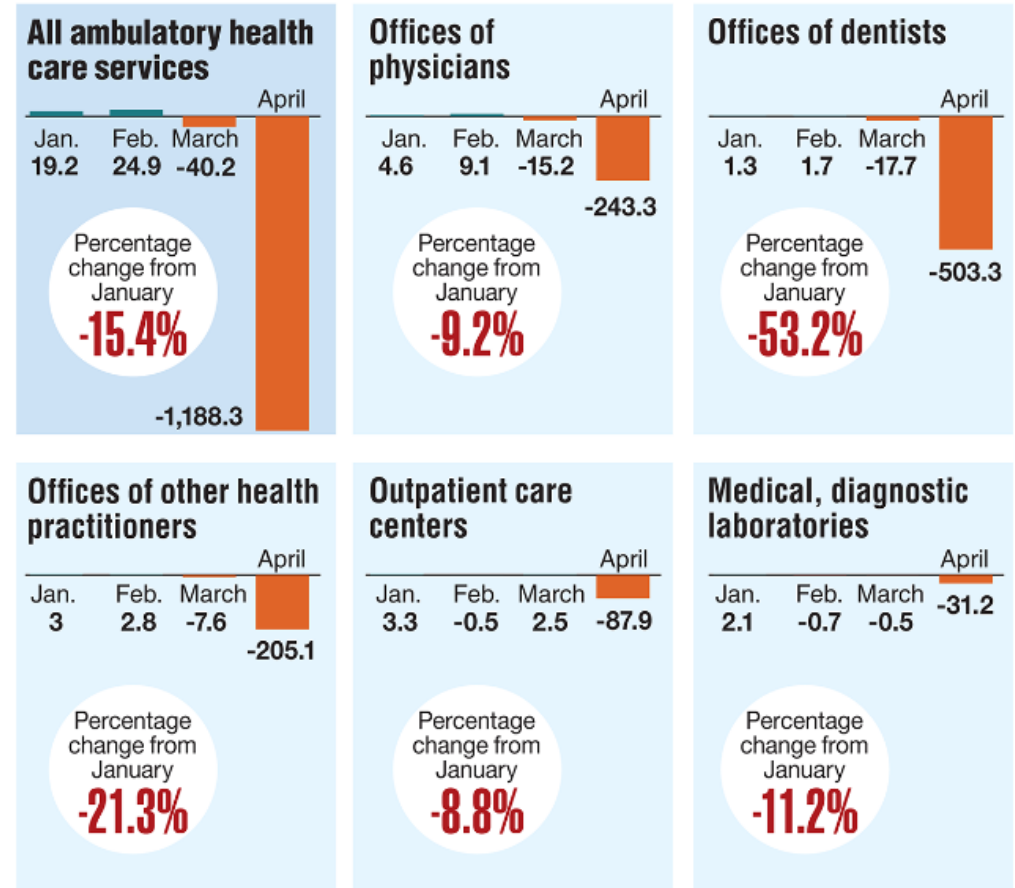


May 08, 2020 09:10 AM

Healthcare loses 1.4 million jobs in April as unemployment rate hits 14.7%

Change in employment

Increase/decrease in seasonally adjusted total from previous month. Numbers are in thousands



Question of the Week

Insight: Having more N95s in stock means practices are more likely to be open.

Practice Status by Availability of N95/KN95 masks

